

Data Exchange – External Partners Applying a Digital Signature to a PDF

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DISCLAIMER: SSA includes the following instructions for using Adobe, and disclaims any liability caused by your use of this product.

A. Purpose

This procedure establishes the necessary steps for using Adobe Reader or Adobe Acrobat Pro to apply a certificate-based digital signature to a PDF with a pre-placed signature box.

This is a general guide only. Not every agency will have the same screens, errors, or method for applying a digital signature to a PDF. If your agency already provided instructions for applying a digital signature to a PDF, you should follow your agency provided instructions.

B. Applicability

This procedure applies to personnel with a need to apply a digital signature using a certificate-based digital signature to a document with approved digital signature use.

C. Requirements

Resources required to complete this procedure include:

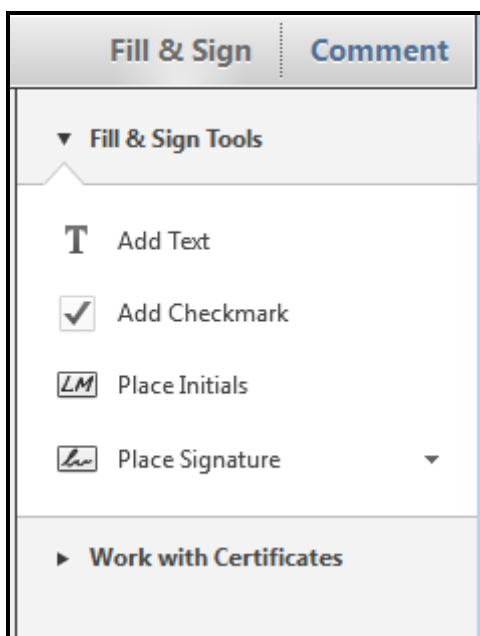
- Adobe Reader or Adobe Acrobat Pro
NOTE: This tutorial was created using Adobe Reader XI.
- The document to be signed in PDF form saved locally on the computer
- A digital certificate for identity verification

D. Required Steps With Smart Card Credentials

1. Open the PDF file with Adobe Acrobat or Adobe Reader.
2. Click on “Fill & Sign” in the upper right hand corner.



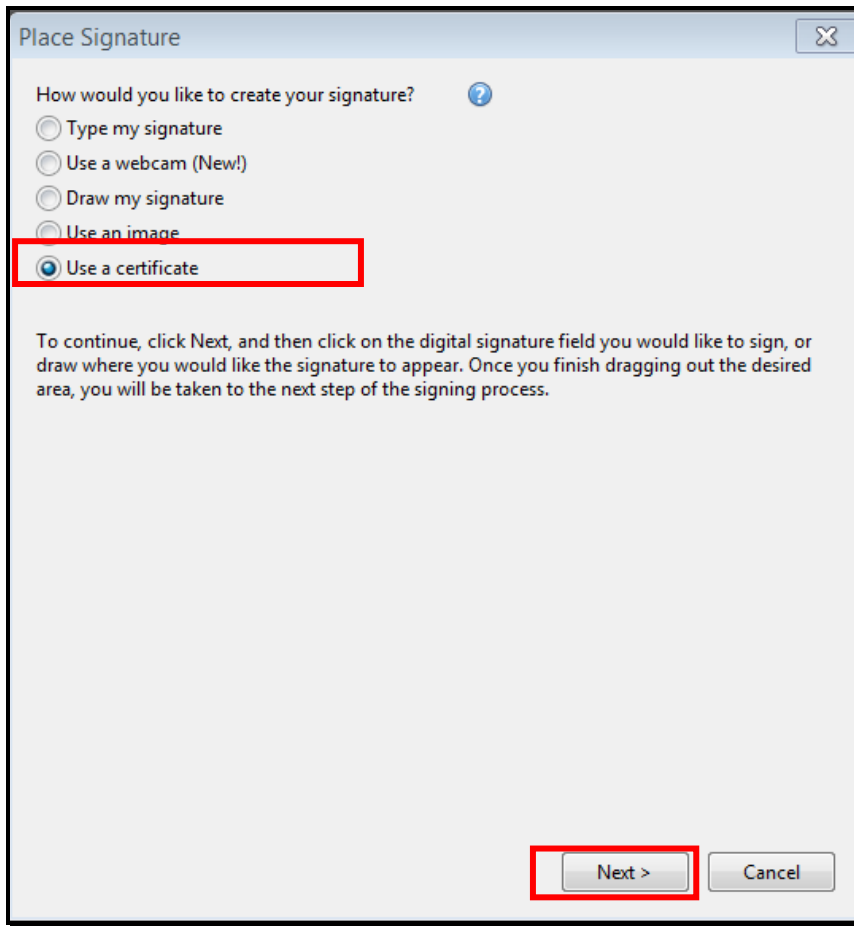
3. The “Fill & Sign” menu will then expand.



4. Click on "Place Signature."



5. Depending on your version of Adobe, a pop-up window may appear asking you how you would like to create your signature. Choose "type my signature". If this pop-up window does not appear move to #6.

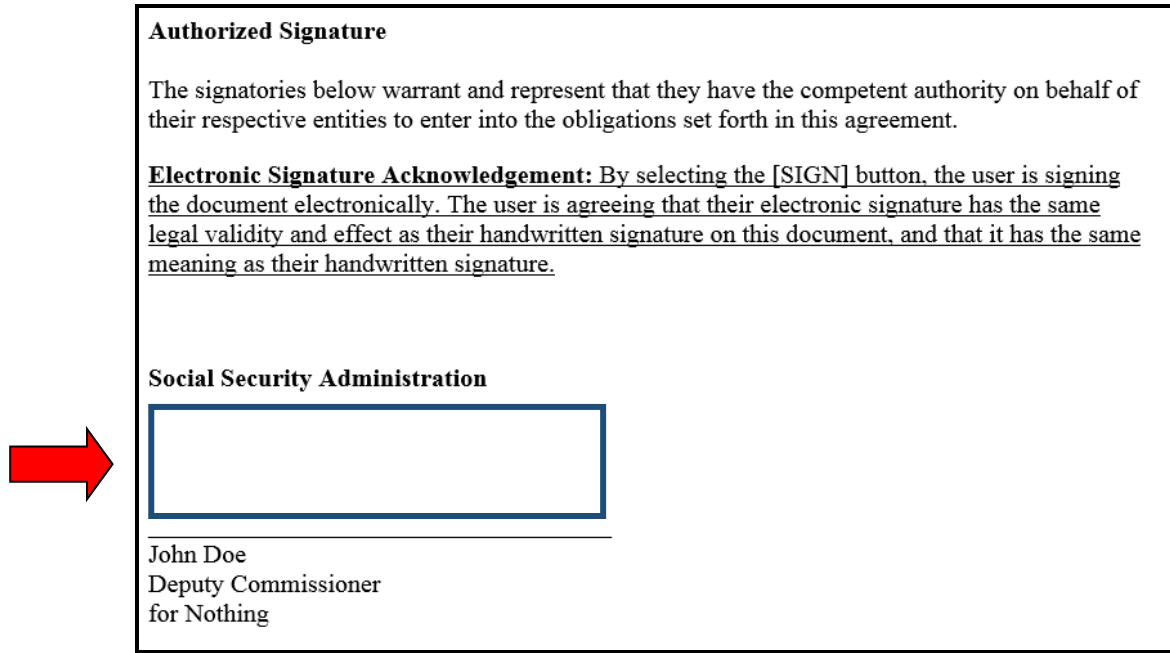


6. A pop-up window will appear. Click on “Drag New Signature Rectangle...”



7. Scroll down through the document to the signature line or where the signature is desired (i.e. – Authorized Signatures and Dates), click and hold the left mouse button, and drag the cursor at an angle away from your starting point.

NOTE: The rectangular box should measure out to be the same space of the signature line so that the signature will be an adequate size and is readable.



Authorized Signature

The signatories below warrant and represent that they have the competent authority on behalf of their respective entities to enter into the obligations set forth in this agreement.

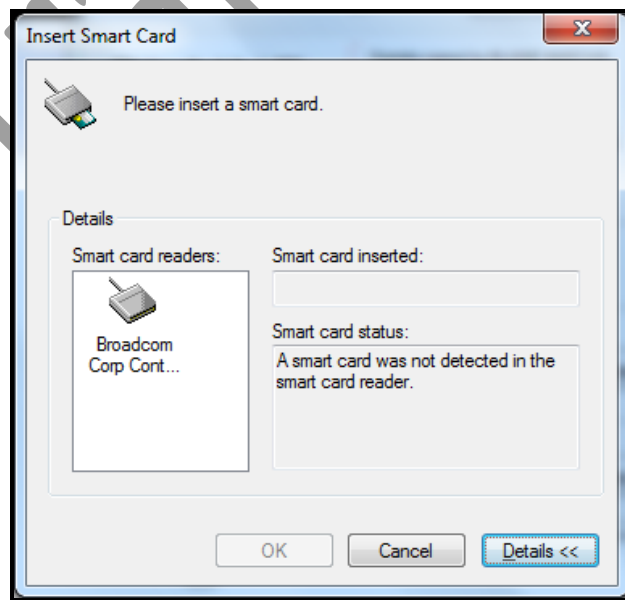
Electronic Signature Acknowledgement: By selecting the [SIGN] button, the user is signing the document electronically. The user is agreeing that their electronic signature has the same legal validity and effect as their handwritten signature on this document, and that it has the same meaning as their handwritten signature.

Social Security Administration

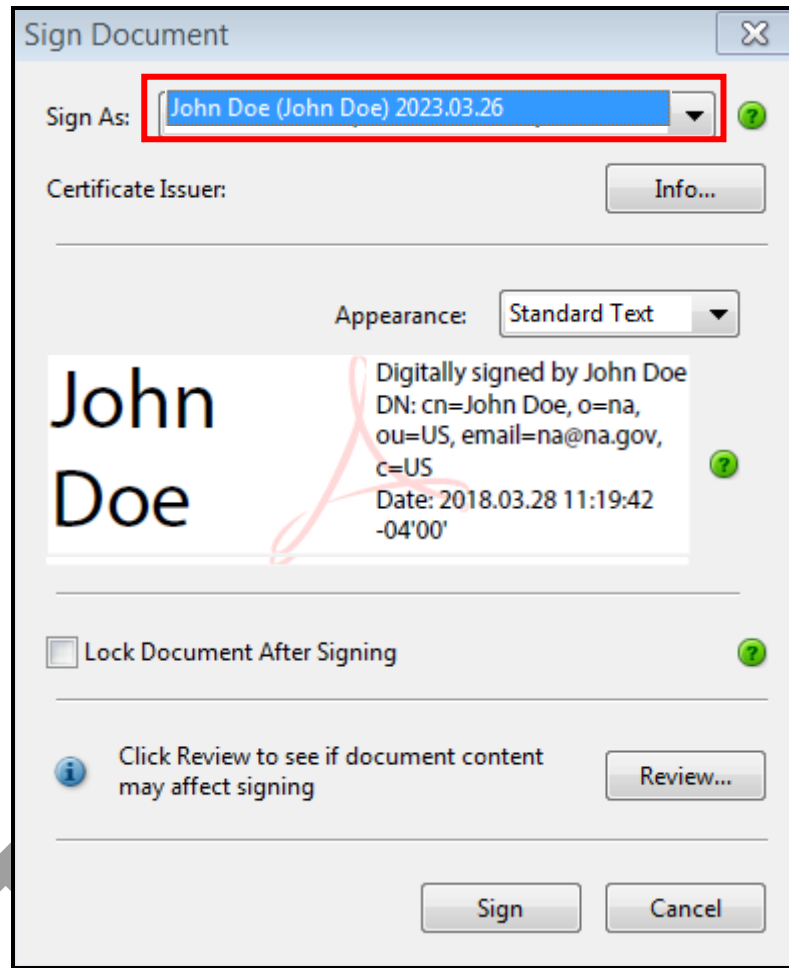
[Signature Box]

John Doe
Deputy Commissioner
for Nothing

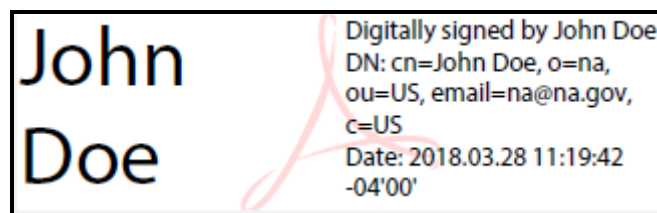
NOTE: If you receive the following message (or similar), ensure your Smart Card credential is inserted into the card reader.



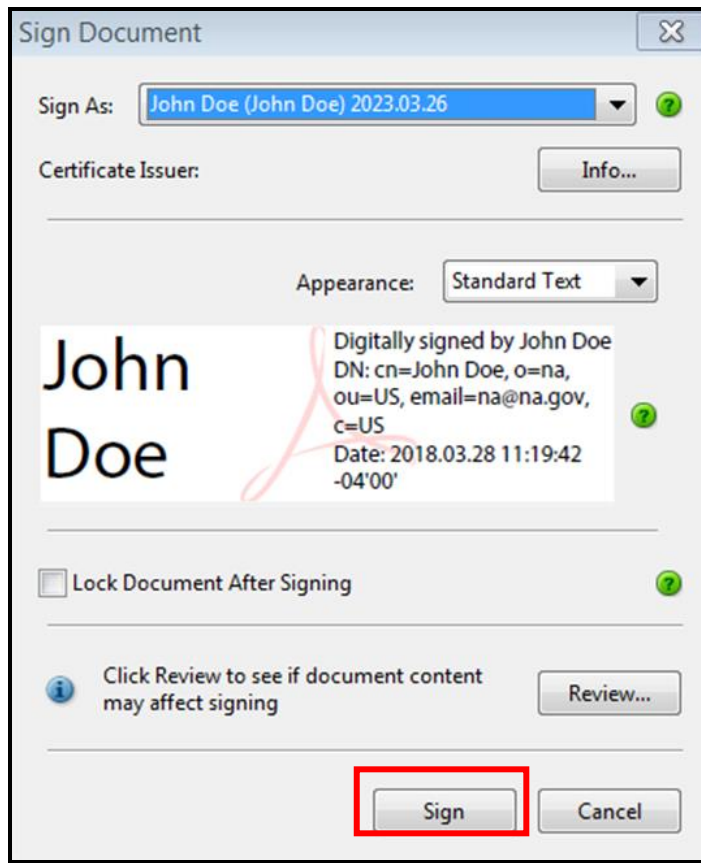
8. A pop-up window will appear. If the “Sign As:” drop down is not already populated with your credentials, use the drop down menu to select your credential.



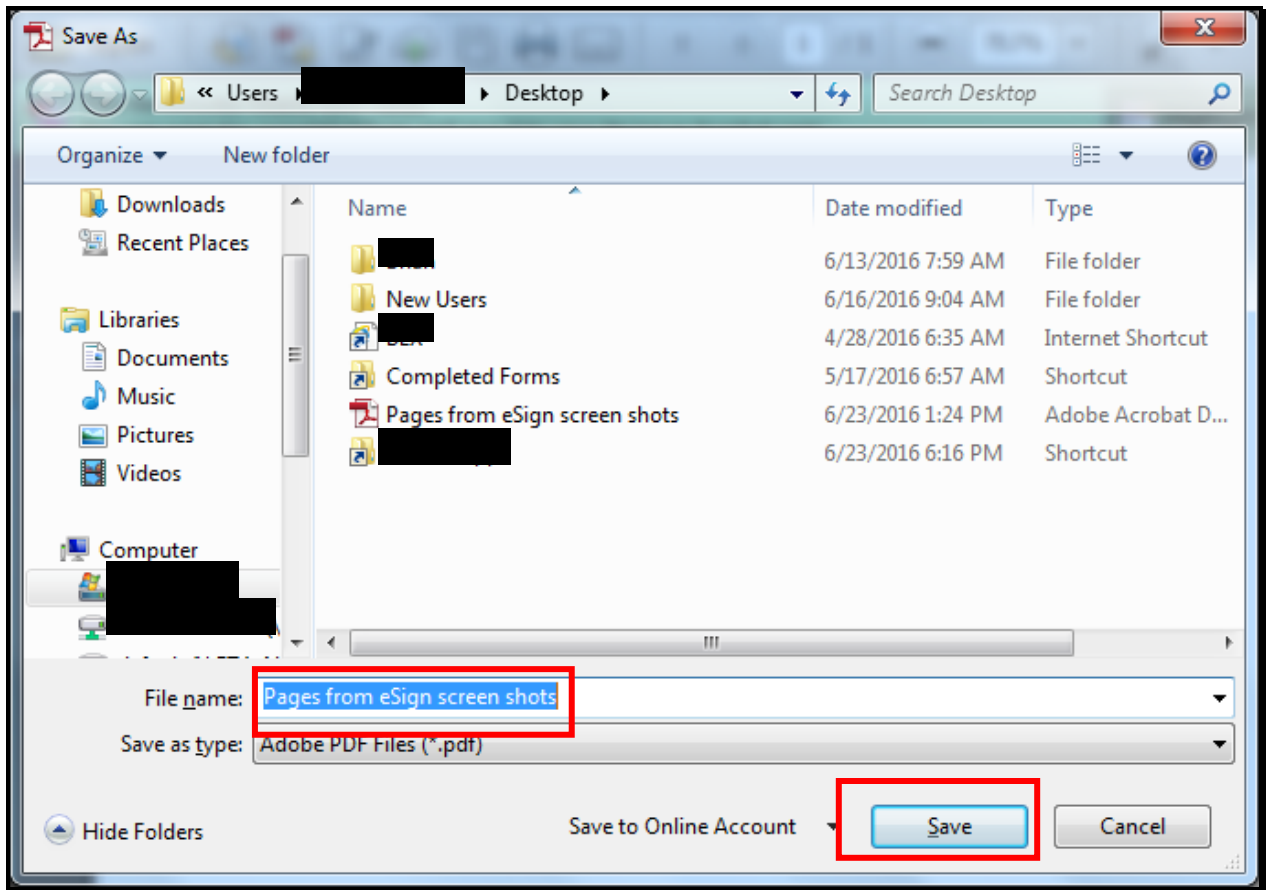
- a. If your credential does not appear, verify your Smart Card credential is in the card reader, then on the drop down menu select “Refresh ID List.”
- b. The signature appearance will look similar to the example below.



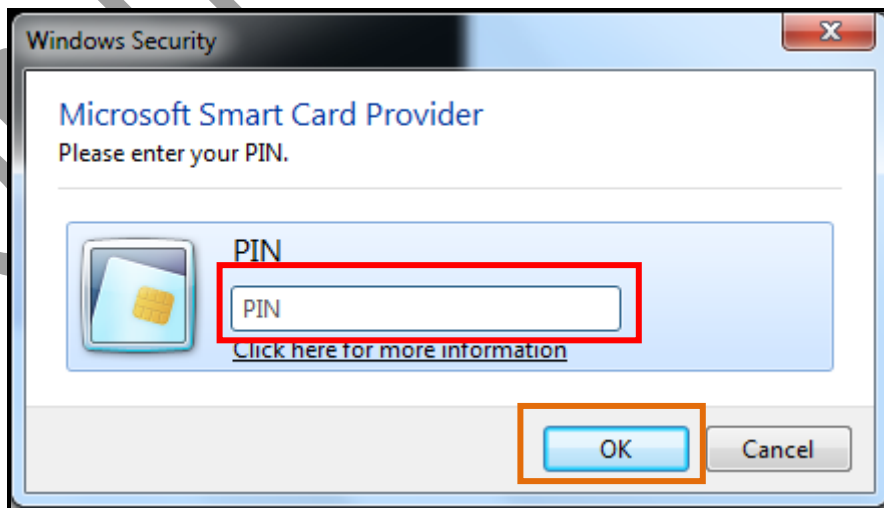
9. Verify the displayed information is correct. Click “Sign.”



10. The system will prompt you to save the document. Save the document.



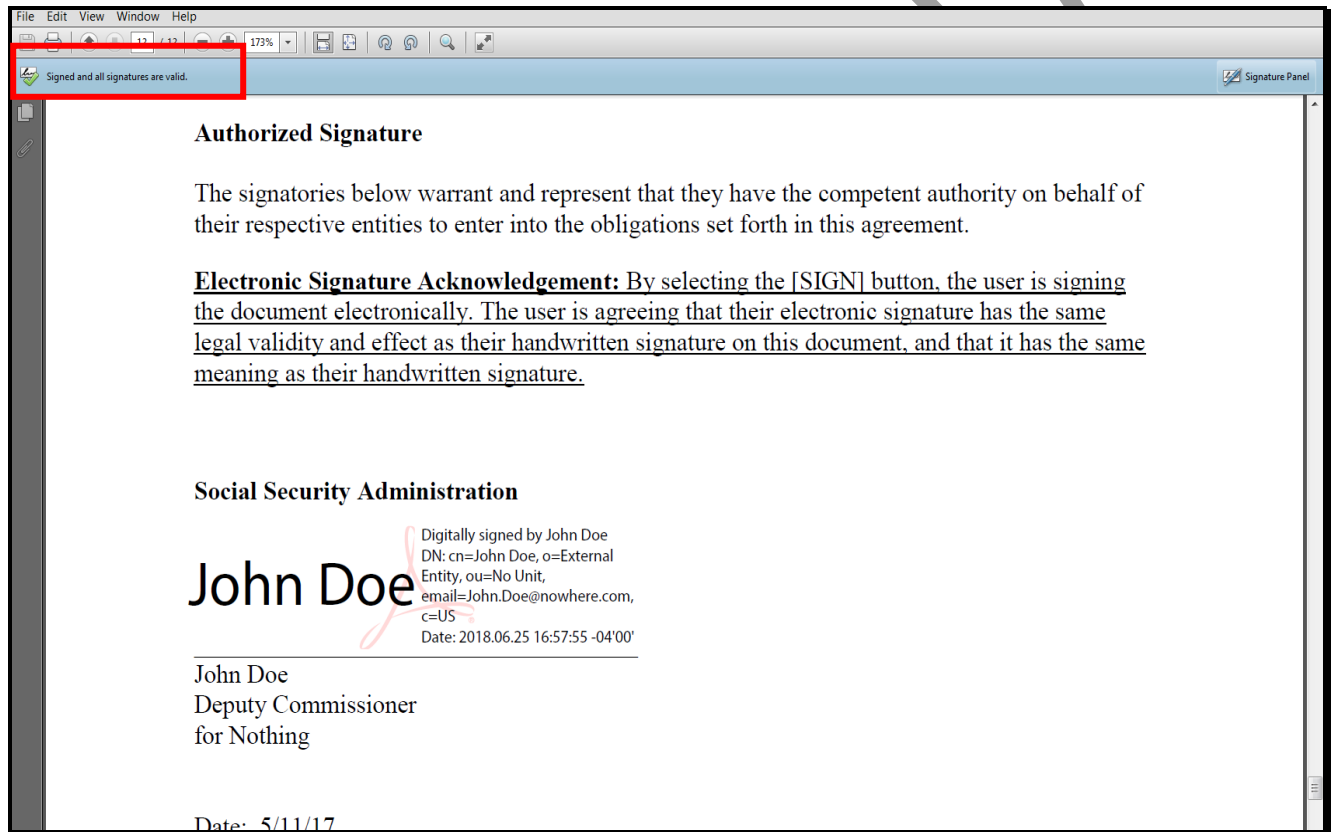
11. A new pop-up window will appear prompting you to enter the PIN associated with your Smart Card credential. Enter the PIN and select "OK."



12. After entering your PIN, the digital signature will appear in place of the rectangle.

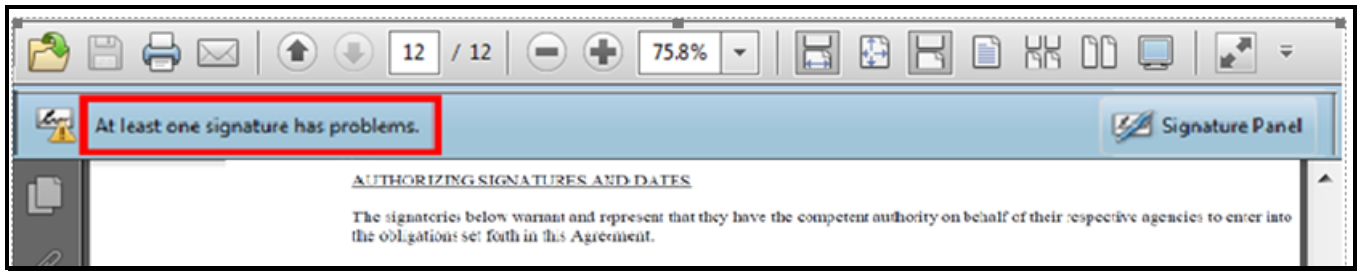
When all signatures are valid, a message will display that the document is “Signed and all signatures are valid.” (Refer to example below.)

NOTE: The “Signed and all signatures are valid” may not always appear. If your digital signature still appears in place of the rectangle, you may proceed.



13. When the document is signed and all signatures are valid, save the document and return to the requestor.

NOTE: If there are problems with at least one signature, a message will display reading “At least one signature has problems.” (Refer to example below.) If this happens with your signature, you should try electronically signing again or correct the issues before sending to the requestor. Otherwise, the signature will not be considered valid.

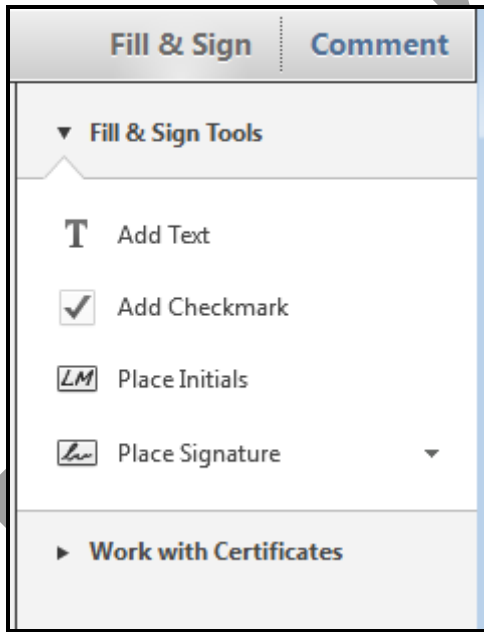


E. Required Steps Without Smart Card Credentials

1. Open the PDF file with Adobe Acrobat or Adobe Reader.
2. Click on "Fill & Sign" in the upper right hand corner.



3. The "Fill & Sign" menu will then expand.



4. Click on "Place Signature."

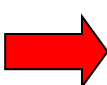


5. A pop-up window will appear. Click on “Drag New Signature Rectangle...”



6. Scroll down through the document to the signature line or where the signature is desired (i.e. – Authorized Signatures and Dates), click and hold the left mouse button, and drag the cursor at an angle away from your starting point.

NOTE: The rectangular box should measure out to be the same space of the signature line so that the signature will be an adequate size and is readable.



Authorized Signature

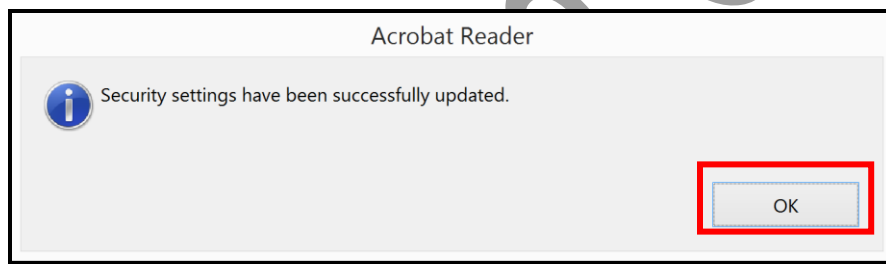
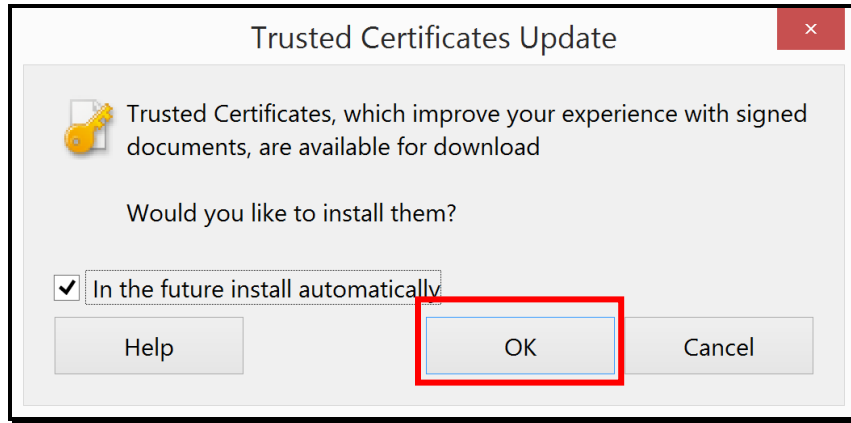
The signatories below warrant and represent that they have the competent authority on behalf of their respective entities to enter into the obligations set forth in this agreement.

Electronic Signature Acknowledgement: By selecting the [SIGN] button, the user is signing the document electronically. The user is agreeing that their electronic signature has the same legal validity and effect as their handwritten signature on this document, and that it has the same meaning as their handwritten signature.

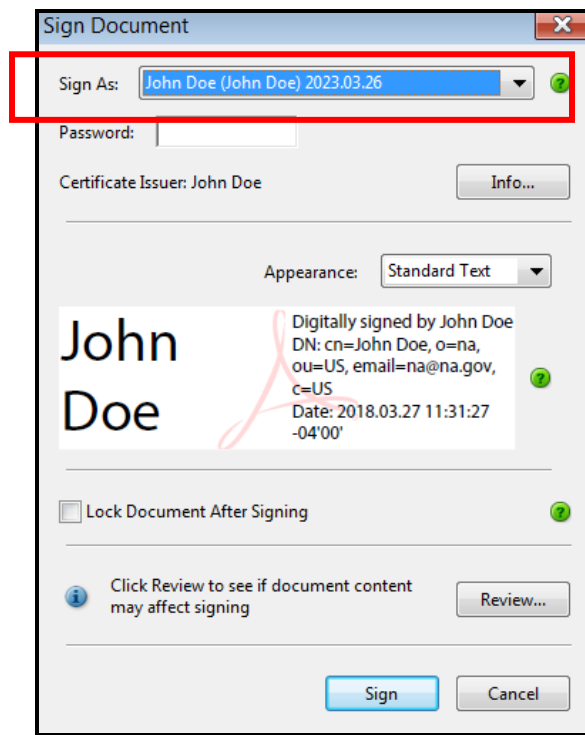
Social Security Administration

John Doe
Deputy Commissioner
for Nothing

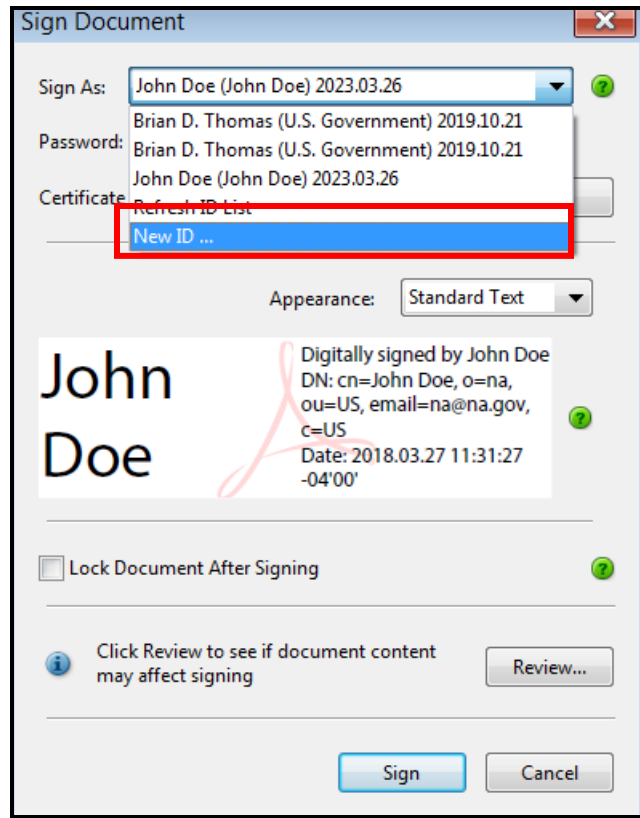
- a. If you receive one of the following messages below (or a similar message), click “OK” to proceed.



7. If you previously created a digital signature then select that signature from the “Sign As” box and click “Next” and skip to step 12.



8. If this is your first use of a digital signature, from the “Sign As” box select “New ID...”



9. A second pop-up window will appear “Add Digital ID.” Select the radio button for “A new digital ID I want to create now.” Click “Next”.



10. A pop-up window will appear. If not already selected, select the radio button for “New PKCS#12 digital ID file.” Click “Next.”

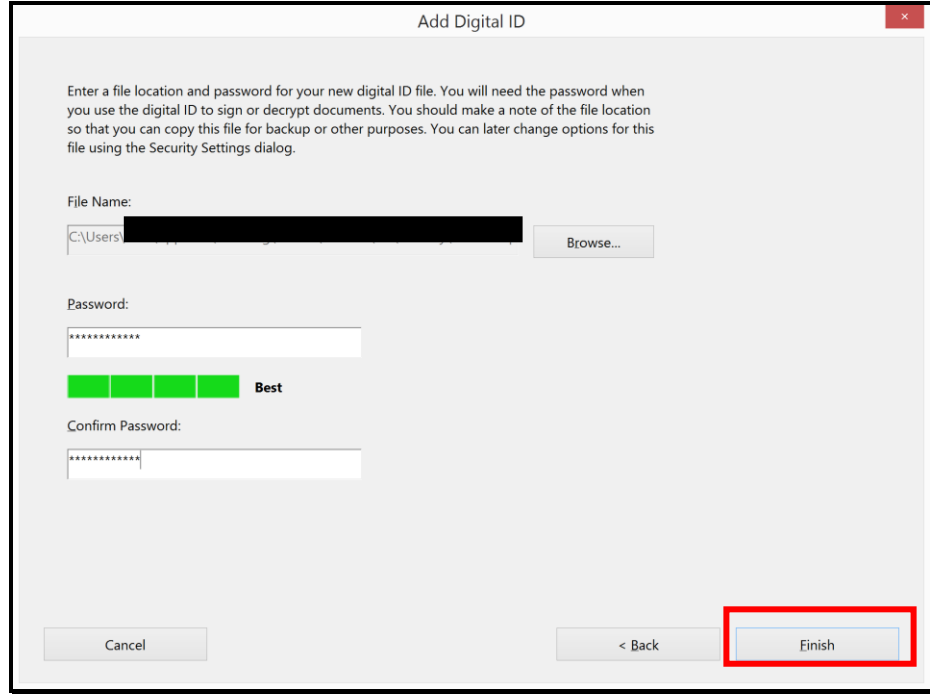
The screenshot shows a dialog box titled "Add Digital ID". The question "Where would you like to store your self-signed digital ID?" is at the top. There are two radio button options: "New PKCS#12 digital ID file" (which is selected and highlighted with a red box) and "Windows Certificate Store". Below the first option, there is explanatory text: "Creates a new password protected digital ID file that uses the standard PKCS#12 format. This common digital ID file format is supported by most security software applications, including major web browsers. PKCS#12 files have a .pfx or .p12 file extension." Below the second option, there is text: "Your digital ID will be stored in the Windows Certificate Store where it will also be available to other Windows applications. The digital ID will be protected by your Windows login." At the bottom, there are three buttons: "Cancel", "< Back", and "Next >". The "Next >" button is highlighted with an orange box.

11. A new pop-up window will appear. Complete the fields on the form with the applicable information. Once completed click “Next.”

The screenshot shows the same "Add Digital ID" dialog box, but now it prompts for identity information: "Enter your identity information to be used when generating the self-signed certificate." The form contains the following fields and values: "Name (e.g. John Smith):" John Doe, "Organizational Unit:" US, "Organization Name:" Self Employed, "Email Address:" na@na.com, "Country/Region:" US - UNITED STATES (dropdown), "Key Algorithm:" 1024-bit RSA (dropdown), and "Use digital ID for:" Digital Signatures and Data Encryption (dropdown). At the bottom, there are three buttons: "Cancel", "< Back", and "Next >". The "Next >" button is highlighted with a red box.

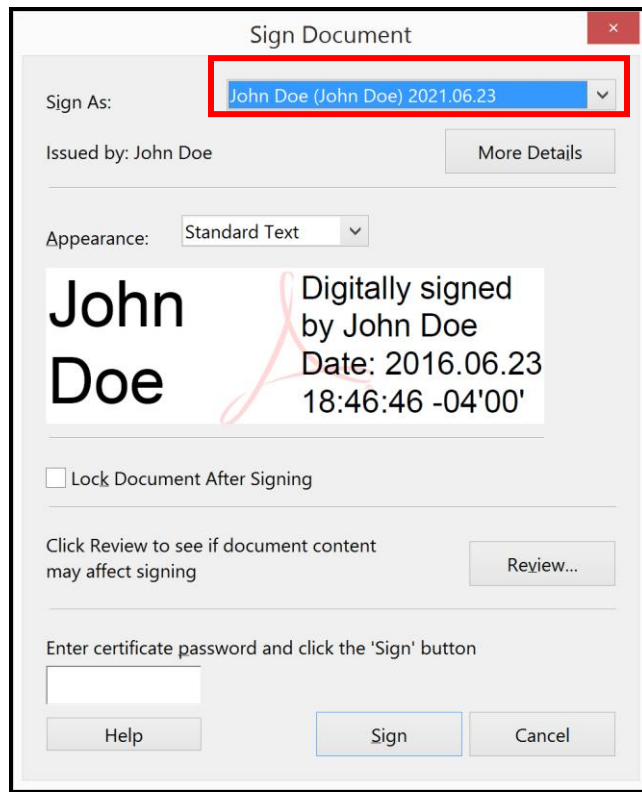
12. A new pop-up window will appear prompting you to create a password associated with the digital signature. Enter a password, confirm the password, and select “Finish.”

NOTE: You must remember the password you created for future electronic signing.

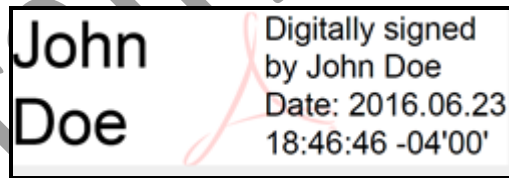


The screenshot shows a Windows-style dialog box titled "Add Digital ID". Inside, there is instructional text: "Enter a file location and password for your new digital ID file. You will need the password when you use the digital ID to sign or decrypt documents. You should make a note of the file location so that you can copy this file for backup or other purposes. You can later change options for this file using the Security Settings dialog." Below this, there are three input sections: "File Name:" with a text box containing "C:\Users\" and a "Browse..." button; "Password:" with a text box filled with asterisks and a strength indicator showing four green bars and the word "Best"; and "Confirm Password:" with another text box filled with asterisks. At the bottom, there are three buttons: "Cancel", "< Back", and "Finish". The "Finish" button is highlighted with a red rectangular border.

13. If the “Sign As” drop down is not already populated, use the drop down menu to select the digital signature.



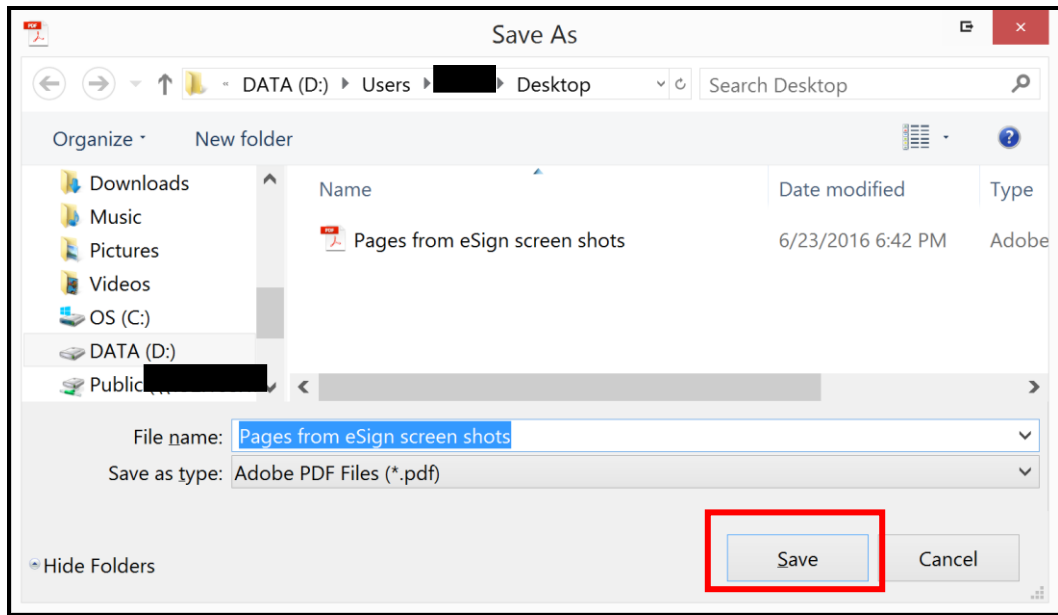
The signature appearance will look similar to the example below



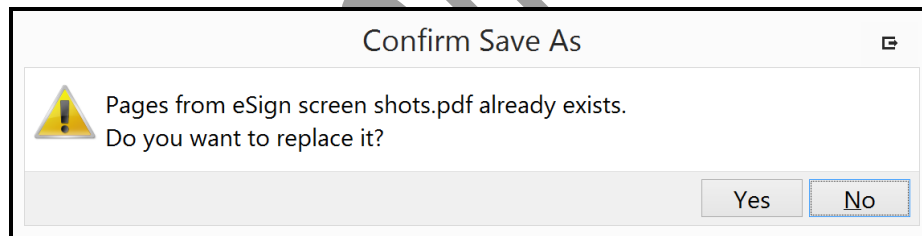
14. Verify the displayed information is correct. Enter the password you created and click “Sign.”

NOTE: If the information is not correct, **do not** click “sign”. Go back to **step #8** and begin the process of creating a signature.

15. The system prompts you to save the document. Save the document.



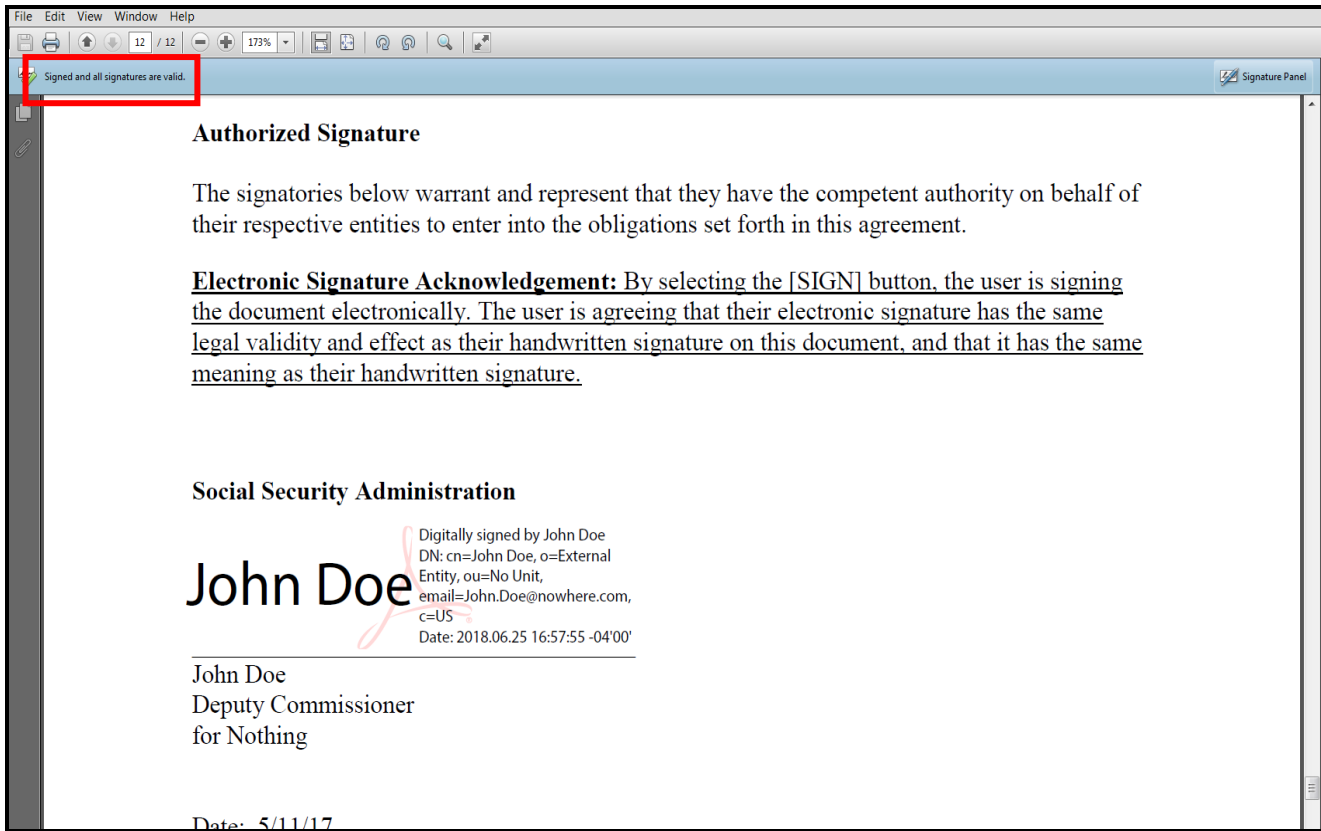
NOTE: If you do not change the name or location of your document when you save it, you will receive the following message. If you are ok with overwriting the unsigned version, click “Yes.” If not, click “No,” and change the name of the document before saving.



16. After signing the document, the digital signature will appear in place of the rectangle.

When all signatures are valid, a message will display that the document is “Signed and all signatures are valid.” (Refer to example below.)

NOTE: The “Signed and all signatures are valid” may not always appear. If your digital signature still appears in place of the rectangle, you may proceed.



17. When you sign the document and all signatures are valid, save the document and return to the requestor.

NOTE: If there are problems with at least one signature, a message will display reading “At least one signature has problems.” (Refer to example below.) If this happens with your signature, you should try signing again or correct the issues before sending to the requestor. Otherwise, the signature is not valid. Go back to **step #13** and try again.

